A1630-5

Paper, Paperboard & Wood Pulp

Monthly Statistical Summary - Vol. 72 No. 2 **February 1994**

HIGHLIGHTS

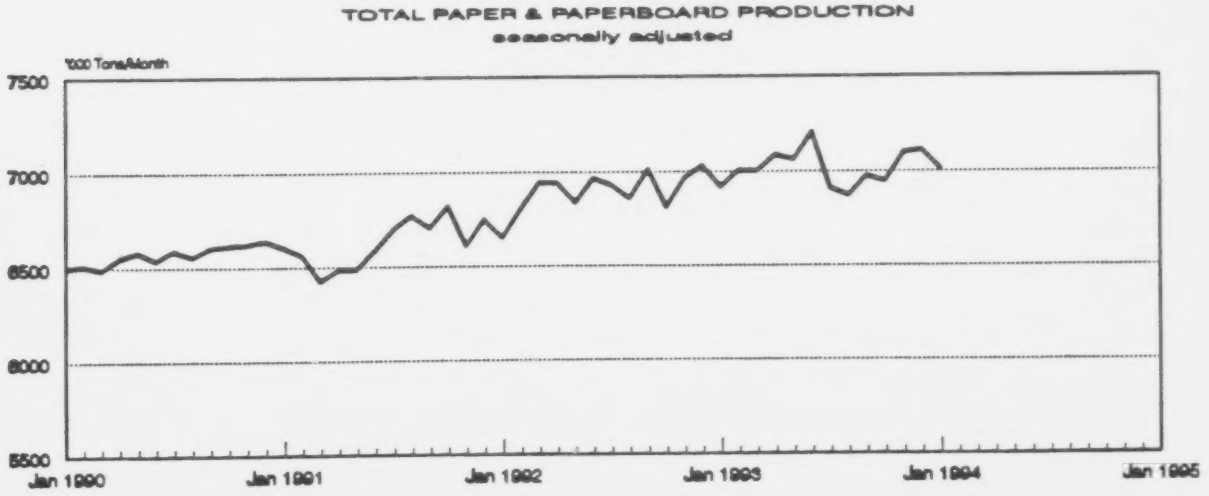
- Paper and paperboard production exceeded its year-ago level by 1.4% in January, with all of the increase accounted for by the paperboard sector which posted a 3.4% production gain. Paper production trailed its year-ago volume by 0.7% in January 1994.

- Seasonally-adjusted paper and paperboard production (see graph) eased slightly between December and January, possibly reflecting the severe weather conditions in many parts of the country.

- Containerboard inventories at box plants and mills trended lower in January, continuing a pattern that has been in evidence since early 1993.

- The Canadian Pulp and Paper Association recently reclassified approximately 300,000 tons of paper shipments to the U.S. from newsprint to groundwood.

- The U.S. recovery rate for paper and paperboard reached the 40% mark in the final quarter of 1993 and averaged 39.4% for the entire year.



Paper: Seasonally-adjusted paper production edged lower in January and was off 0.9% from its average fourth quarter 1993 level. Compared to year-ago, production of tissue papers was up a handsome 4.5% in January, newsprint production was up fractionally, packaging and other converting papers held even, and printing-writing papers lagged.

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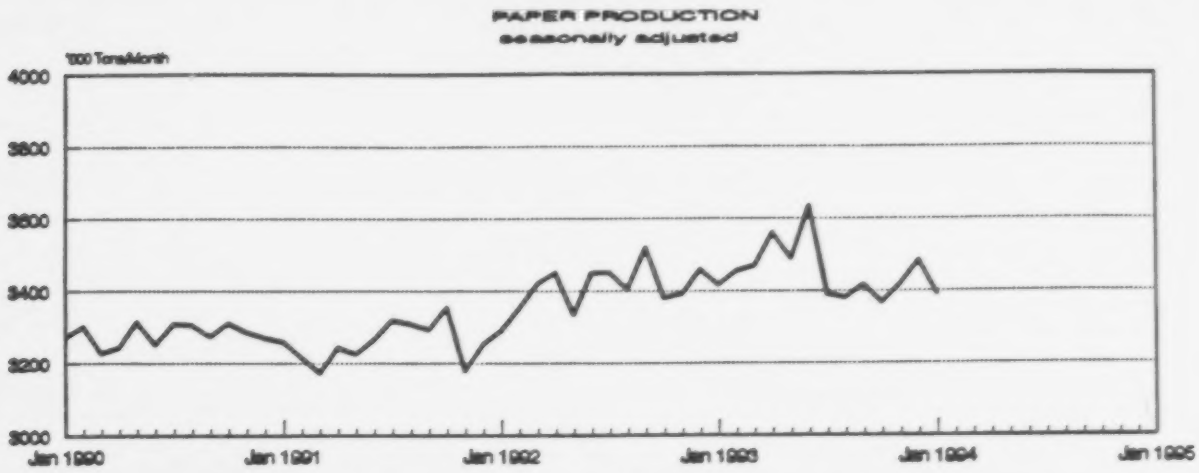


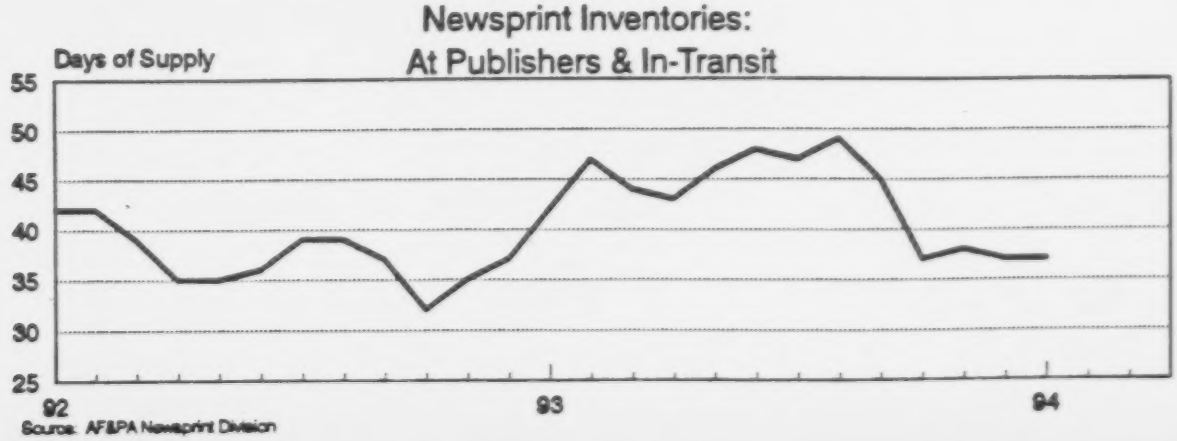
Canadian newsprint shipments to the U.S. have been revised by the Canadian Pulp and Paper Association (CPPA) to reflect a reclassification of newsprint tonnage to groundwood. The revisions reduced reported newsprint shipments to the U.S. from Canada by 2.1% in 1991, 3.0% in 1992, and 2.8% in 1993.

The reclassification reduced 1993 newsprint new supply (U.S. shipments to the domestic market plus imports less exports) by 1.4% -- from 12.94 million tons to 12.76 million tons.

Based on these revised numbers, newsprint new supply contracted 7.1% in 1991, and then grew 1.6% in 1992 and 0.8% in 1993. The corresponding growth rates prior to the revisions were -6.1%, 2.0%, and 0.7%.

The U.S. share of North American newsprint shipments to the domestic market stood at 50% in 1992 and 49.2% last year.

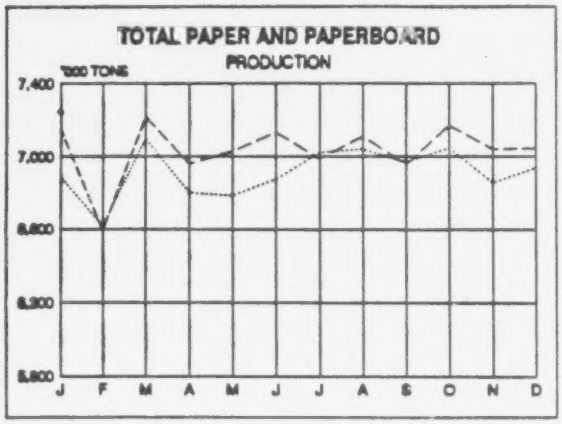
U.S. shipments of newsprint exceeded their year-ago level by 2.0% in January 1994, reflecting a 1.7% increase in shipments to the domestic market and a 4.3% expansion in shipments to other nations. Canadian newsprint shipments to the U.S. trailed their year-ago level by 11.6% in January. Newsprint stocks on hand at publishers and in transit amounted to 37 days of supply at the end of January 1994, the same level as last December but a 5-day reduction relative to January 1993.

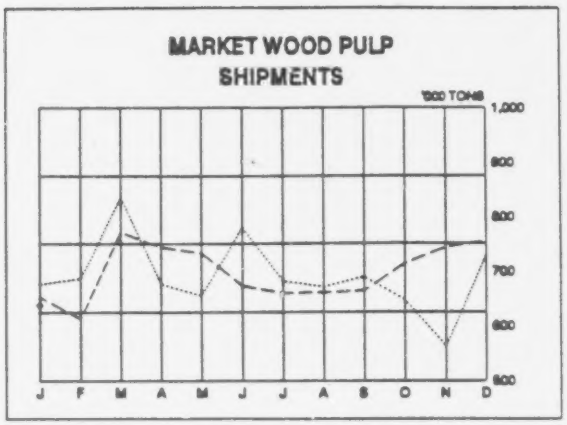


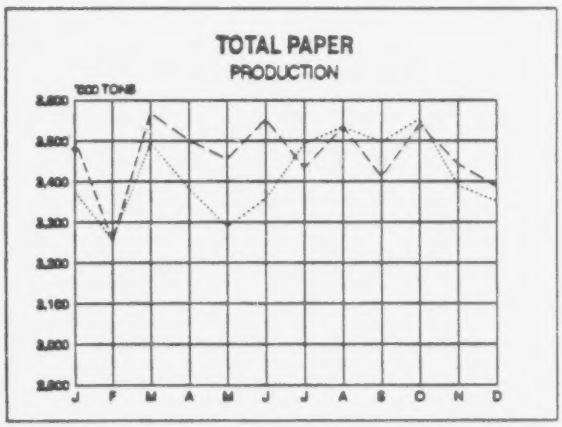
PAPER AND PAPERBOARD STATISTICS PRODUCTION, SHIPMENTS AND ORDERS (Thousands of Tons)	YEAR 1992	YEAR 1993	OCT 1993	NOV 1993	DEC (R) 1993	JAN (P) 1994	Annual Rate Y-T-D 1994	% Change From Same Period Last Year
PAPER								
Newsprint - Production	7,082	7,089	609	591	577	618	7,418	0.5
- Shipments	7,125	7,050	596	604	589	618	7,391	2.0
Printing & Writing: Total Shipments	23,394	23,868	2,014	1,962	1,824	1,956	23,471	-2.5
Groundwood Paper - Shipments	1,809	1,742	161	147	148	144	1,727	-1.9
- New Orders	1,855	1,825	169	123	149	158	1,897	-8.5
- Unshipped Orders	184	150	229	201	206	212	212	41.0
Coated Groundwood - Shipments	4,364	4,290	333	347	345	346	4,149	-4.4
Coated Free Sheet - Shipments	3,755	3,894	340	319	317	309	3,704	-2.3
Total Coated Papers - Shipments	8,119	8,183	674	666	662	654	7,853	-3.4
- New Orders	8,151	8,283	857	813	742	656	7,854	-6.4
- Unshipped Orders	803	782	725	857	747	718	718	-5.8
Uncid Free Sheet - Shipments	12,170	12,336	1,037	1,011	977	1,023	12,275	-2.8
- New Orders	12,293	12,481	1,022	982	874	998	11,975	-11.2
- Unshipped Orders	720	794	808	864	873	743	743	-6.4
Thin Papers - Shipments	175	157	14	13	14	13	156	-9.4
Cotton Fiber Paper - Shipments	159	164	14	13	14	13	150	-7.2
Bleached Bristols - Shipments	1,163	1,286	114	112	111	109	1,309	7.4
Tissue Paper - Production	5,784	6,006	518	496	514	517	6,206	4.5
Total Packaging & Other Paper	4,713	4,802	395	386	371	387	4,639	-0.0
Unbl. Kraft Paper - Shipments	2,380	2,254	187	187	180	197	2,365	2.8
Bl. Kraft Paper - Production	403	400	37	34	32	34	408	-2.0
Specialty Pkg. Paper - Production	667	644	61	53	50	50	605	-4.9
Special Industrial Paper - Production	1,244	1,304	111	112	110	105	1,261	-1.9
TOTAL PAPER PRODUCTION - UNADJ	40,973	41,546	3,536	3,437	3,385	3,478	41,734	-0.7
TOTAL PAPER PRODUCTION - SEAS ADJ			3,368	3,420	3,483	3,393	40,716	-0.7
PAPERBOARD - PRODUCTION								
Containerboard	29,357	29,587	2,506	2,492	2,548	2,614	31,383	3.2
Cont'bd For Dom Use for Fibre Boxes	25,746	26,175	2,222	2,177	2,218	2,258	27,097	0.1
Total Linerboard	17,785	18,173	1,552	1,510	1,527	1,549	18,587	-0.9
Unbleached Kraft	16,850	16,732	1,424	1,402	1,411	1,421	17,047	-2.3
Solid Bleached	150	146	12	13	13	11	134	7.7
Recycled	784	1,296	116	95	103	117	1,405	18.8
Corrugating Medium	7,961	8,001	670	667	692	709	8,510	2.3
Semichemical	5,722	5,741	481	476	503	488	5,850	-1.2
Recycled	2,239	2,261	189	191	189	222	2,660	11.2
Other Containerboard for Dom Use	345	309	23	24	23	27	328	-12.2
Containerboard for Export	3,267	3,103	280	291	307	328	3,938	34.0
Boxboard	12,611	13,214	1,126	1,107	1,109	1,151	13,810	3.8
Boxboard for Packaging for Dom Use	7,390	7,718	643	642	644	674	8,083	2.4
Folding Boxboard	5,651	5,906	500	487	485	503	6,037	-0.1
Solid Bleached	1,588	1,978	165	165	175	157	1,889	1.3
Unbleached Kraft	1,143	1,197	97	91	100	120	1,445	8.9
Recycled *	2,620	2,730	238	232	210	225	2,704	-4.3
Set-up Boxboard for Dom Use	283	303	31	28	20	31	366	39.3
Milk Carton & Food Service Dom Use	1,457	1,509	112	127	139	140	1,680	5.5
Other Boxboard for Domestic Use	4,158	4,404	368	376	382	401	4,808	11.2
Boxboard for Export	1,063	1,092	95	89	103	77	920	-15.0
Paperboard Production by Furnish	41,968	42,811	3,632	3,598	3,657	3,764	45,172	3.4
Unbleached Kraft	21,658	21,447	1,818	1,814	1,854	1,897	22,758	2.9
Semichemical	5,902	5,820	493	489	515	503	6,041	1.7
Solid Bleached Kraft	4,503	4,605	371	367	415	384	4,613	0.5
Recycled	9,906	10,936	950	909	873	980	11,760	8.4
Paperboard Production for Export	4,329	4,195	356	360	410	405	4,859	20.8
Unbleached Kraft	3,320	3,209	273	296	321	328	3,938	33.3
Semichemical	180	185	12	13	12	16	191	-3.6
Bleached Kraft	756	742	65	62	71	64	853	-16.1
Recycled	72	79	5	8	7	6	78	-16.6
TOTAL PAPERBOARD PRODUCTION - UNADJ	41,968	42,811	3,632	3,598	3,657	3,764	45,172	3.4
TOTAL PAPERBOARD PROD - SEAS ADJ			3,582	3,676	3,631	3,623	43,476	3.4
PAPER AND PAPERBOARD - UNADJ	82,941	84,357	7,168	7,035	7,042	7,242	86,906	1.4
PAPER AND PAPERBOARD - SEAS ADJ			6,950	7,095	7,114	7,016	84,192	1.4

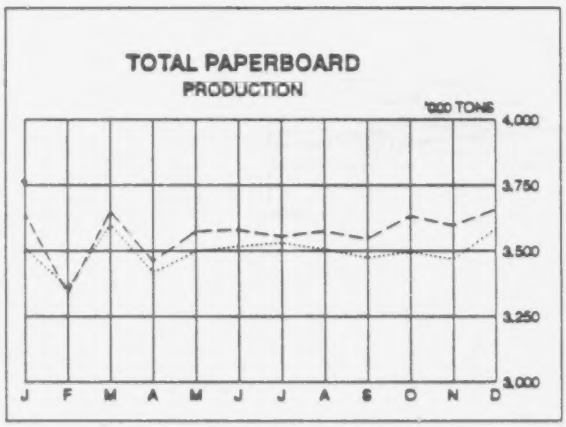
R - Revised P - Preliminary Seas. Adj. - Seasonally Adjusted Unadj - Not Seasonally Adjusted

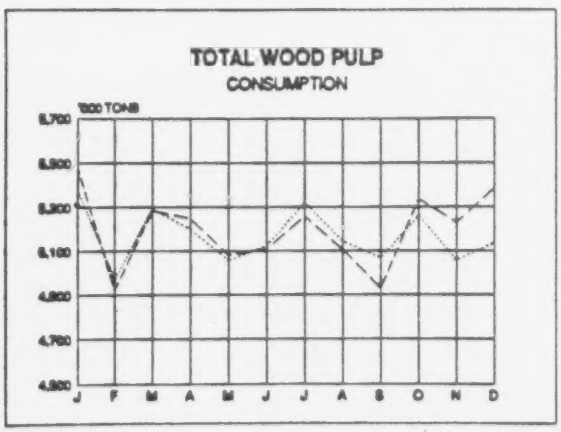
* Container Chip and Filler reclassified into Recycled Corrugating Medium

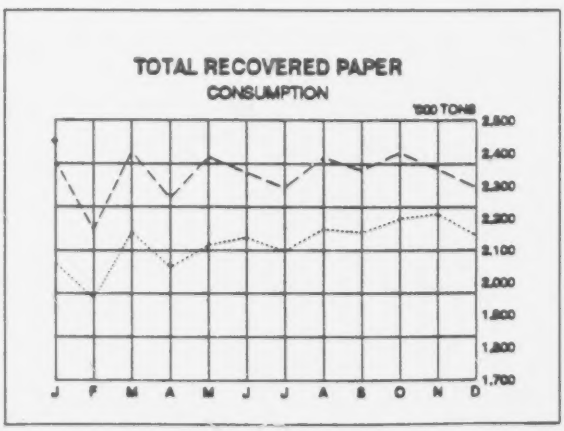












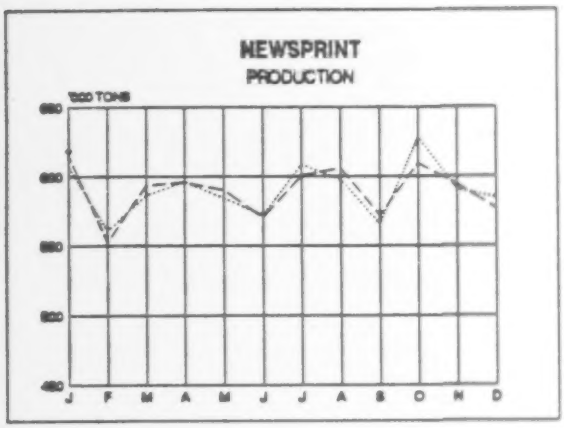
1992 ..... 1993 ——— 1994 *

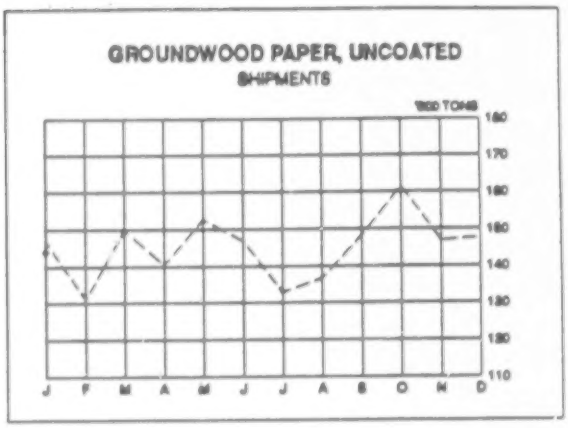
WOOD PULP STATISTICS (Thousands of Tons)		YEAR 1991	YEAR 1992	IQ 1993	IIQ 1993	IIIQ 1993	IVQ 1993	Annual Rate Y-T-D 1993
TOTAL WOOD PULP								
Total Wood Pulp	Production	62,266	63,960	15,728	15,650	15,498	16,032	62,908
(Paper Grades)	Imports	4,824	4,882	1,400	1,274	1,353	1,293	5,320
	Exports	5,566	6,421	1,490	1,546	1,387	1,427	5,851
	New Supply	61,524	62,421	15,638	15,287	15,464	15,898	62,286
Paper Grades	Production	51,768	53,358	13,147	13,086	12,978	13,527	52,738
Chemical Pulp	Imports	4,504	4,570	1,280	1,156	1,258	1,196	4,889
	Exports	5,516	6,321	1,453	1,511	1,371	1,411	5,747
	New Supply	50,756	51,607	12,974	12,731	12,864	13,311	51,880
Groundwood and	Production	6,404	6,501	1,576	1,555	1,516	1,511	6,158
Thermo-Mech.	Imports	320	312	121	119	95	97	431
	Exports	50	100	38	35	16	16	104
	New Supply	6,673	6,713	1,659	1,639	1,595	1,592	6,485
Semi-Chemical	Production	4,094	4,101	1,005	1,008	1,005	995	4,012
	Imports							
	Exports							
	New Supply	4,094	4,101	1,005	1,008	1,005	995	4,012
MARKET WOOD PULP								
Paper Grades	Production	7,660	8,670	2,031	2,043	2,092	1,951	8,117
Chemical Pulp	Imports	2,816	2,946	792	736	787	817	3,132
	Exports	5,169	5,906	1,321	1,445	1,294	1,511	5,571
	New Supply	5,307	5,709	1,502	1,335	1,585	1,257	5,678

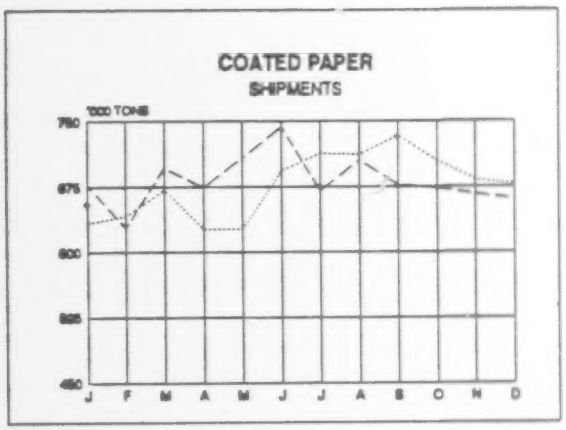
Sources: Total Wood Pulp Production & Market Wood Pulp Production, Imports & Exports - Pulp Division, Pul Materials and Technology Group, AFPA. Total Wood Pulp Imports & Exports - Department of Comm

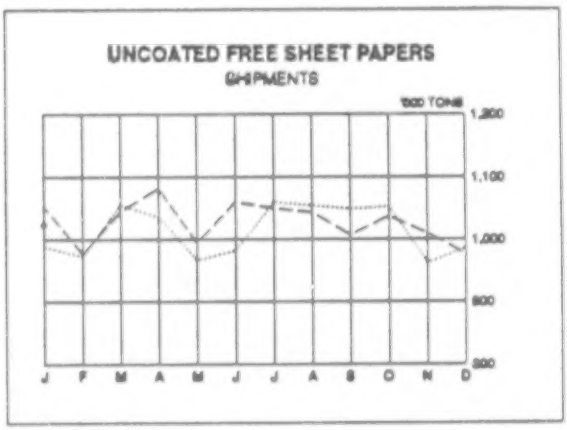
FIBROUS RAW MATERIALS (Thousands of tons)	YEAR 1991	YEAR 1992	IQ 1993	IIQ 1993	IIIQ 1993	IVQ 1993	Annual Rate Y-T-D 1993
CONSUMPTION AT PAPER & PAPERBOARD MILLS							
Total	84,272	87,451	22,617	22,422	22,318	22,993	90,350
Total Wood Pulp	61,301	62,011	15,681	15,435	15,291	15,949	62,356
Recovered Paper	22,971	25,440	6,936	6,987	7,027	7,044	27,994
INVENTORIES **							
Chemical Paper Grade Market Pulp							
Producers' Own-Use Inventories	219	194	203	205	219	182	219
Producers' Market Inventories	518	882	876	768	874	783	874
Consumers' Purchased Inventories *	451	407	450	400	377	N.A.	377
Recovered Paper at Paper & Bd. Mills	1,119	1,152	1,101	1,107	1,097	1,056	1,097
Days of Supply at Pulp Mills of Chemical Paper Grade Mkt Pulp **	23	41	38	32	39	39	39

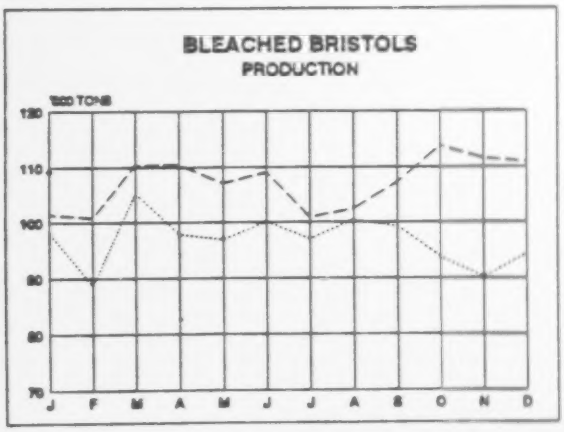
Sources: Wood Pulp Data: Pulp Division, Pulp, Materials and Technology Group, AFPN.A. - Not Available
Recovered Paper Data: Paper Recycling Committee, AFPA. * Includes all grades of wood pulp
P - Preliminary; R - Revised; (0) - Indicates zero to five-hundred short tons. ** - End of period.

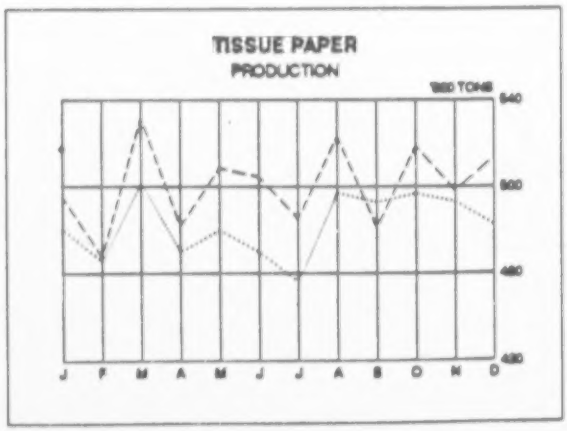












1992 ..... 1993 ——— 1994 *

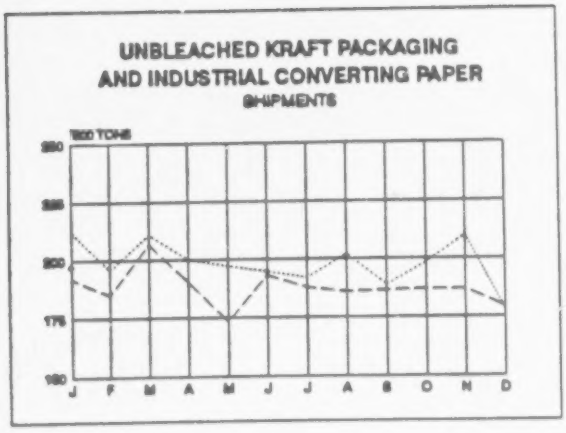
FIBROUS RAW MATERIALS Thousands of Standard (128 Cu. ft.) Cords	YEAR 1991	YEAR 1992	Sep 1993	Oct 1993	Nov 1993	Dec 1993	ANNUAL RATE Y-T-D 1993	% CHANGE FROM SAME PD LAST YEAR
PULPWOOD								
Total U.S. – Total Receipts	99,889	103,991	8,899	8,899	8,741	9,002	106,092	2.1
– Total Consumption	99,242	104,586	8,547	8,848	8,678	9,004	106,275	5.8
– Residues *	94,097	99,784	8,572	8,849	8,512	8,848	43,134	6.4
– Inventories	5,898	5,514	5,883	5,951	5,833	5,969	5,969	12.7
So. Atlantic – Total Receipts	91,286	93,704	2,889	2,902	2,889	2,998	94,958	3.7
– Total Consumption	91,625	94,015	2,796	2,830	2,919	2,998	94,980	2.0
– Residues *	16,186	15,173	1,231	1,277	1,256	1,349	14,918	13.2
– Inventories	1,264	1,199	1,489	1,514	1,486	1,503	1,503	26.4
Northeast – Total Receipts	7,233	7,511	659	639	614	684	7,791	8.7
– Total Consumption	6,840	7,241	647	610	631	658	7,751	5.8
– Residues *	1,707	1,800	148	151	140	150	1,782	-1.0
– Inventories	423	947	833	864	828	830	830	-4.9
South Central – Total Receipts	38,751	42,885	3,357	3,794	3,794	3,872	44,542	4.4
– Total Consumption	38,321	42,866	3,673	3,840	3,802	3,875	44,089	2.8
– Residues *	11,703	15,844	1,480	1,486	1,425	1,486	17,886	13.2
– Inventories	1,837	1,736	1,984	2,001	2,038	2,126	2,126	22.6
North Central – Total Receipts	7,207	7,310	606	627	684	708	7,419	1.5
– Total Consumption	7,313	7,339	599	637	630	664	7,606	2.3
– Residues *	1,187	1,139	88	94	87	145	1,118	-1.8
– Inventories	935	813	741	729	664	721	721	-11.3
West – Total Receipts	14,092	12,701	998	967	970	987	11,372	-10.5
– Total Consumption	18,943	12,947	981	920	998	919	11,284	-12.6
– Residues *	8,324	6,128	615	951	905	819	7,722	-6.0
– Inventories	1,419	1,219	1,286	1,333	1,329	1,307	1,307	7.2

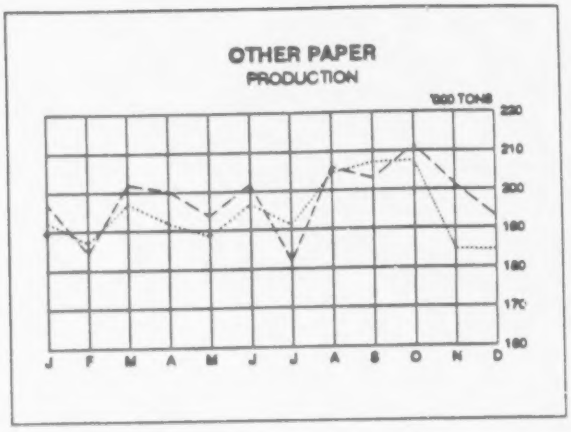
SOURCE: American Pulpwood Association * – Consumption of Residues in cords equivalent

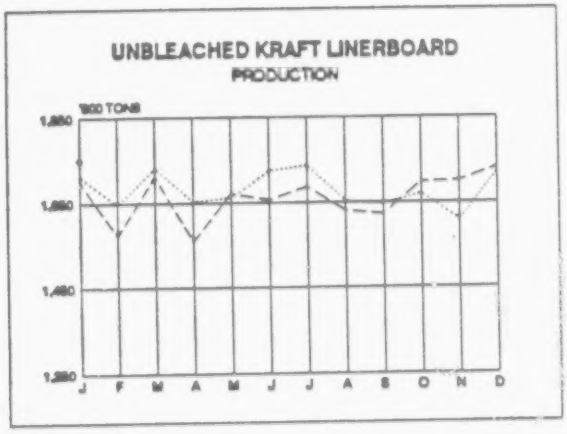
UNITED STATES TRADE WITH CANADA	IMPORTS FROM CANADA YEAR 1992 Tons	YEAR 1992 ($000)	November 1993 Tons	November 1993 ($000)	December 1993 Tons	December 1993 ($000)	ANNUAL RATE Y-T-D 1993 Tons	% CHANGE FROM SAME PD LAST YEAR
Pulpwood, Roundwood (In cubic meters)	0	0	0	0	0	0	0	0.0
Pulpwood chips	510,775	18,379	28,481	1,171	90,619	1,600	980,060	-39.6
Wood Pulp, Total	4,272,019	1,769,418	375,755	119,911	364,221	113,562	4,662,248	8.1
Waste Fibrous Materials, Total	134,916	23,340	10,056	1,348	12,016	1,391	127,838	2.3
Paper, Board & Products, Total	10,842,116	5,877,861	1,001,891	515,999	919,654	491,536	11,548,456	6.5
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Bd.	10,638,999	5,493,009	978,287	479,172	897,218	417,466	11,291,873	6.1
Paper, Paperboard & Products	10,891,734	5,947,813	991,120	516,334	912,088	488,566	11,427,396	7.2
Paper & Paperboard, Only	10,518,949	5,462,870	967,498	467,627	889,832	415,474	11,170,712	6.2
Paper, Total	6,679,943	5,130,294	680,857	426,377	606,371	388,610	10,348,618	5.9
Newsprint	7,248,226	3,595,746	643,599	284,609	606,216	280,047	7,630,129	5.5
Printing, Writing & Rel. Pap.	2,095,956	1,284,773	226,496	126,531	179,022	106,875	2,350,583	5.5
Pack. & Ind. Conv. Paper	218,620	131,427	17,576	10,117	15,193	8,818	204,576	-6.5
Special Industrial Paper	88,388	96,042	6,577	6,417	8,981	6,627	80,409	1.8
Tissue Paper	58,981	49,306	6,424	4,742	5,990	4,444	73,962	26.4
Paperboard, Total	840,008	882,579	86,859	82,150	80,391	28,864	921,094	8.7
Convtd Paper&Paperbd Products	393,218	484,943	23,624	48,797	22,436	44,081	356,583	28.3
Wet Machine Board	813	721	86	94	65	63	800	-1.8
Construction Paper & Board	119,436	39,417	10,736	3,810	7,821	1,917	120,361	1.8

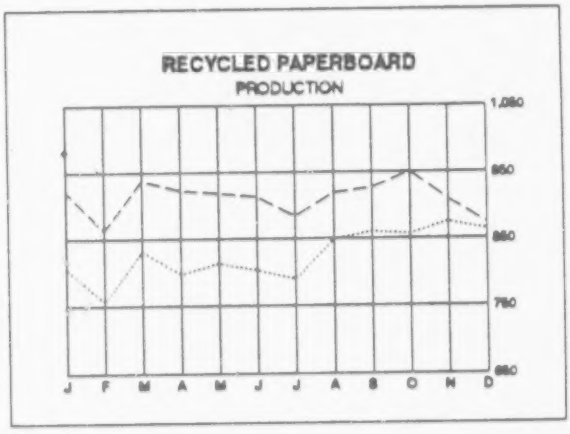
	EXPORTS TO CANADA							
Pulpwood, Roundwood (In cubic meters)	2,304,578	80,233	174,791	5,475	199,480	5,865	2,393,993	2.7
Pulpwood chips	384,094	19,539	47,046	2,323	43,178	2,264	883,388	-0.2
Wood Pulp, Total	444,574	146,084	35,273	10,379	22,411	6,853	913,005	-29.6
Cotton Pulp & Other Pulp	11,356	6,756	284	200	288	196	5,710	-49.8
Waste Paper	796,302	115,934	85,762	11,209	80,804	10,899	1,182,446	46.5
Paper, Board & Products, Total	1,886,736	1,832,891	144,991	148,143	139,389	138,976	1,710,671	7.9
Paper, Paperboard, Wet Machine Bd. & Constr. Paper & Bd.	1,184,140	983,462	104,575	94,939	91,586	77,918	1,231,576	6.7
Paper, Paperboard & Products	1,887,887	1,828,318	144,886	149,026	139,289	135,931	1,704,072	7.8
Paper & Paperboard, Only	1,832,947	989,099	104,813	94,722	91,516	77,273	1,235,577	7.2
Paper, Total	867,226	896,351	85,809	88,190	80,093	64,806	871,802	-2.3
Newsprint	94,556	17,241	486	217	484	287	14,376	-89.4
Printing, Writing & Rel. Pap.	486,679	480,145	41,038	40,842	35,947	97,575	480,106	-0.1
Pack. & Ind. Conv. Paper	60,287	43,617	5,488	4,263	4,199	3,324	56,540	-6.2
Special Industrial Paper	87,555	117,480	9,979	10,473	6,233	90,034	85,480	25.9
Tissue Paper	28,574	27,969	2,536	2,996	3,360	3,378	96,931	21.3
Paperboard, Total	466,677	992,748	48,704	55,532	41,423	22,886	864,375	21.8
Convtd Paper&Paperbd Products	444,886	889,219	40,065	84,304	87,773	91,858	478,186	7.8
Wet Machine Board	0	0	0	0	0	0	0	N.M.
Construction Paper & Board	11,009	4,993	992	117	69	46	5,990	-46.7

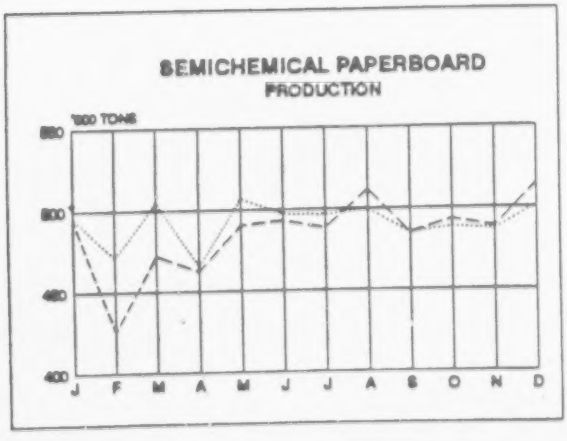
SOURCE: Bureau of Census, Department of Commerce

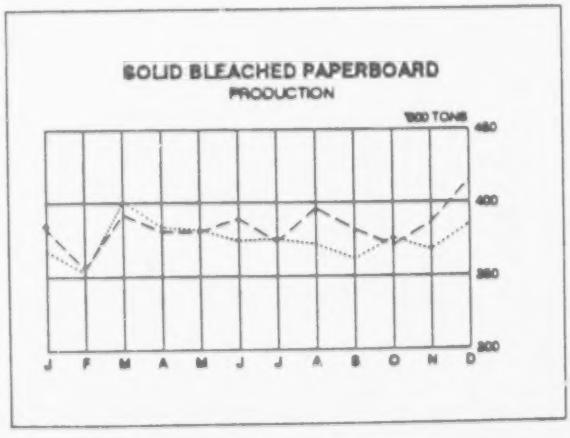












1992 ..... 1993 ------ 1994 *

PULP, PAPER AND PAPERBOARD IMPORTS	YEAR 1992		November 1993		December 1993		Annual Rate YTD 1993	% Change from same Period
	Tons	$000	Tons	$000	Tons	$000	Tons (1)	Last Year
Pulpwood Roundwood (cubic meters)	0	0	0	0	0	0	0	0.0
Pulpwood Chips	612,961	18,462	40,563	1,909	80,721	4,279	753,442	46.9
Total All Imports	17,731,961	10,028,235	1,842,703	854,858	1,570,487	793,120	19,529,543	10.1
Wood Pulp Total	5,029,302	2,094,235	431,099	137,010	431,440	136,321	5,412,797	7.6
Waste Paper	149,656	27,868	10,598	1,419	12,516	1,502	137,835	-7.9
Other Fibrous Materials	10,340	7,022	1,496	614	978	771	8,143	-21.2
Paper Board & Products Total	12,542,663	7,899,310	1,199,512	715,814	1,125,554	655,526	13,970,788	11.4
Paper Paperboard Wet Machine Bd. & Construction Paper & Board	12,112,101	6,754,223	1,154,785	601,999	1,082,782	549,279	13,475,865	11.3
Paper Ppbd & Prds ex Cnst&WMB	12,405,877	7,855,513	1,187,207	711,811	1,115,391	651,417	13,830,567	11.5
Paper & Paperboard Only	11,976,314	6,710,426	1,142,480	597,996	1,072,620	545,170	13,335,464	11.4
Paper Total	11,031,198	6,296,038	1,041,432	557,584	971,296	506,748	12,250,220	11.1
Newsprint	7,339,583	3,596,966	649,545	287,942	616,650	263,573	7,783,906	6.1
Printing & Writing	3,173,196	2,100,089	361,109	222,257	317,601	199,035	3,964,250	25.6
Uncoated Groundwood	1,418,885	859,708	158,470	90,413	129,543	72,022	1,733,551	22.2
Coated Print.& Impreg. Pap.	830,055	908,376	93,316	96,337	91,036	85,948	1,136,928	37.0
Uncoated Free Sheet	902,147	500,413	90,244	56,321	97,077	51,342	991,249	23.8
Thin (except Cigarette)	11,821	15,303	189	513	280	381	6,759	-42.8
Bristols	110,290	116,289	8,991	8,872	9,696	9,342	115,764	5.0
Total Pkg & Other Paper	452,286	541,617	32,774	41,525	29,721	38,678	399,411	-11.7
Unbleached Kraft Paper	228,001	106,122	16,332	8,722	14,209	7,060	177,342	-22.2
Other Pkg. & Indust. Paper	224,285	435,495	16,442	32,803	15,512	31,618	222,070	-1.0
Tissue	66,130	56,346	8,004	5,859	7,327	5,460	82,653	25.0
Paperboard, Total	944,117	414,388	101,049	40,412	101,322	38,423	1,085,243	14.9
Kraft Paperboard	176,950	88,644	20,124	7,496	19,720	7,230	217,945	23.2
Semi-Chemical Corrugating	148,131	36,790	29,816	7,520	24,978	6,288	267,438	80.5
Other Paperboard	619,036	308,954	51,309	25,396	56,624	24,905	599,861	-3.1
Convtd Paper&Paperbd Products	430,562	1,145,087	44,727	113,816	42,772	106,247	496,103	15.0
Paper Products, Total	304,048	891,733	32,211	88,991	31,754	86,370	355,838	17.0
Paperboard Products, Total	126,515	253,353	12,516	24,824	11,018	19,877	139,466	10.2
Wet machine Board	933	816	61	45	66	63	924	-1.0
Construction Paper & Board E	135,853	42,981	12,254	3,958	10,096	4,046	139,278	2.5
Notes								
Other: No Weight Avail. ($000)		151,879		15,192		13,733	170,733	12.4
Total Imports Incl. Other($000)		10,180,113		870,050		806,853	10,587,047	4.0

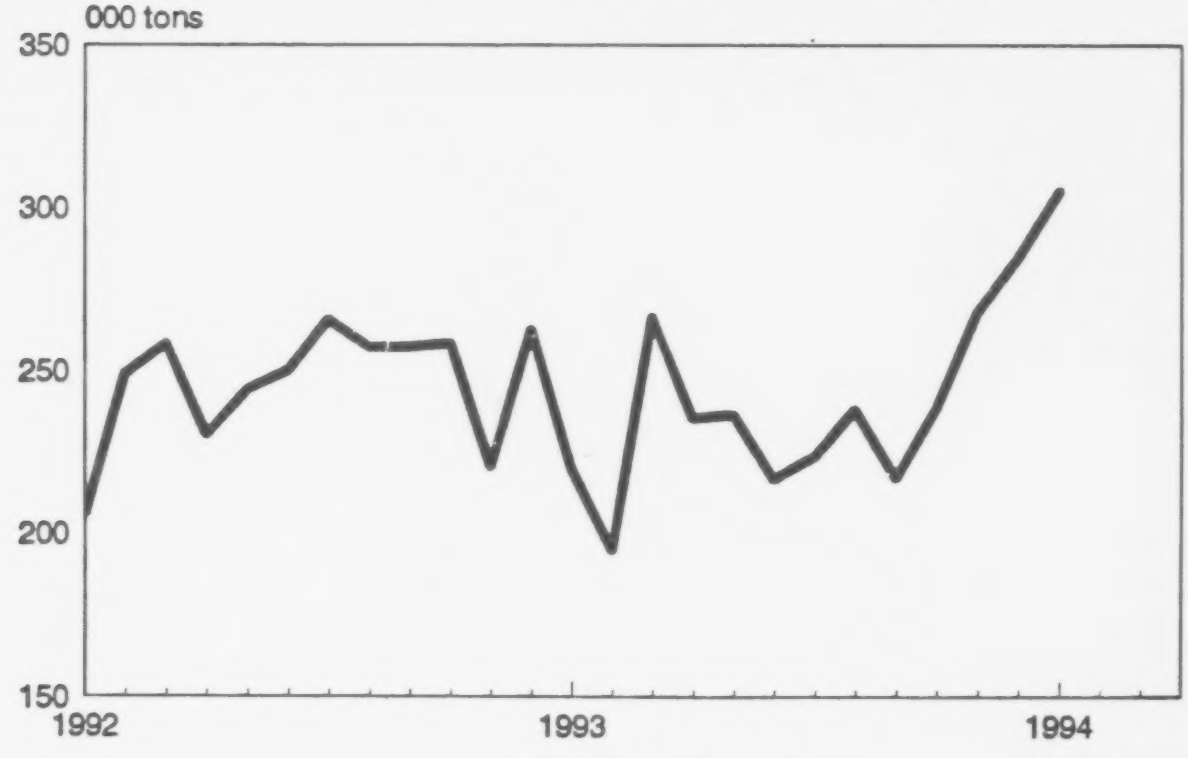
PULP, PAPER AND PAPERBOARD EXPORTS	YEAR 1992		November 1993		December 1993		Annual Rate YTD 1993	% Change from same Period
	Tons	$000	Tons	$000	Tons	$000	Tons (1)	Last Year
Pulpwood, Roundwood (cubic meters)	2,252,713	63,909	188,442	6,236	192,947	6,314	2,337,214	3.8
Pulpwood Chips	5,651,111	474,425	462,352	39,607	454,196	34,870	5,248,132	-7.1
Total All Exports	22,756,589	10,241,859	1,828,902	776,636	1,947,647	793,782	21,637,893	-4.9
Wood Pulp,Total	7,222,258	3,114,419	658,097	180,930	675,847	188,560	6,499,055	-10.0
Cotton Pulp and Other Pulp	115,956	92,001	11,042	7,012	7,362	5,435	124,656	7.5
Waste and Old Paper	5,447,655	643,516	483,721	40,539	511,725	42,163	5,888,369	-8.7
Paper, Board & Products,Total	8,970,720	6,391,924	776,042	548,155	852,712	557,625	9,125,803	1.7
Paper,Paperboard,Wet Machine Bd. & Construction Paper & Board	7,559,285	4,305,067	646,705	351,629	684,984	367,020	7,521,378	-0.5
Paper, Ppbd & Prod ex Cnst&WMB	8,946,054	6,379,472	774,213	547,431	850,848	556,583	9,099,320	1.7
Paper & Paperboard, Only	7,534,619	4,292,615	644,878	350,905	683,101	365,978	7,494,893	-0.5
Paper, Total	2,635,060	2,061,388	209,943	171,964	228,225	175,119	2,586,993	-1.8
Newsprint	1,022,756	467,357	86,139	40,317	102,416	49,460	1,019,146	-0.4
Printing & Writing	1,158,188	1,022,740	88,414	79,491	90,451	80,512	1,120,439	-3.3
Uncoated Groundwood	116,020	82,732	8,023	5,035	7,161	4,875	109,386	-5.7
Clay Coated Paper	360,797	304,699	31,014	24,844	28,062	22,940	342,036	-5.2
Uncoated Free Sheet	448,985	446,094	32,789	35,890	35,420	36,738	425,310	-5.3
Other Printing & Writing	232,386	189,215	16,609	13,921	19,808	16,160	243,707	4.9
Total Pkg. & Other Paper	381,942	483,062	32,057	44,842	29,169	36,248	379,092	-0.7
Unbleached Kraft	141,105	73,814	11,738	6,007	10,814	5,513	130,748	-7.3
Other Pkg. & Indust. Paper	240,736	409,247	20,319	38,835	18,355	30,735	248,345	3.2
Tissue	72,274	88,230	5,332	7,513	6,189	8,899	68,315	-5.5
Paperboard, Total	4,899,569	2,231,227	434,933	178,941	454,876	190,859	4,907,901	0.2
Solid Wood Pulp	4,657,574	2,094,365	415,943	168,783	439,094	180,290	4,645,501	-0.3
Total Linerboard	3,224,393	1,107,389	276,840	81,250	292,734	86,329	2,995,058	-7.1
Bleached Kraft Linerboard	65,802	37,914	2,785	2,101	437	293	14,552	-77.9
Unbleached Kraft Linerbd	3,158,792	1,069,456	274,055	79,148	292,297	86,036	2,980,506	-5.6
Other Unbleached Kraft	396,633	211,163	30,511	15,686	35,112	18,257	505,984	26.9
Other Bleached Kraft	968,950	751,904	93,811	88,043	97,004	71,799	1,025,864	7.0
Semi-Chemical Corrugating	75,598	23,928	14,781	3,805	14,244	3,905	118,595	56.9
Recycled Paperboard	241,985	136,862	18,990	10,158	15,782	10,589	262,399	8.4
Convtd Paper&Paperbd Products	1,411,436	2,086,857	129,337	196,526	167,748	190,805	1,804,427	13.7
Paper Products, Total	638,804	1,347,561	57,896	125,907	100,866	121,432	750,263	17.4
Paperboard Products, Total	772,632	739,295	71,441	70,619	66,882	69,173	854,164	10.6
Wet Machine Board	883	289	0	0	21	15	596	-32.5
Construction Paper & Board E	23,783	12,164	1,829	724	1,843	1,028	25,886	8.8
Notes								
Other: No Weight Avail. ($000)		77,411		7,902		8,402	86,234	11.4
Total Exports Incl. Other($000)		10,319,270		784,538		800,184	9,613,713	-6.8

SOURCE: Bureau of Census, U.S. Department of Commerce. E - Incl. estim. of tonnage based on square foot data.
(1) Annual Rate Year-To-Date is in tons unless otherwise specified in item description.

PRODUCER PRICE INDEXES 1982 = 100	YEAR 1992	YEAR 1993	OCT 1993	NOV 1993	DEC 1993	JAN 1994	Annual Rate Y-T-D 1994	% Change from same Period Last Year
Pulp, Paper and Products except Building Grades	129.2	127.6	126.9	126.9	126.9	126.8	126.8	-1.2
Pulp Paper & Products, ex. Building Grades & ex. Waste Paper *	129.4	127.7	127.2	127.2	127.2	127.1	127.1	-1.0
Total Wood Pulp	118.9	104.3	99.6	98.7	98.5	100.0	100.0	-10.5
Total Paper	123.2	123.8	124.1	123.7	123.4	122.7	122.7	0.0
Writing Paper, exc. Newsprint	120.2	120.5	121.3	120.5	120.2	119.2	119.2	0.3
Newsprint	110.0	112.0	110.6	110.7	110.7	109.7	109.7	-0.6
Total Paperboard	134.3	130.0	129.6	130.5	130.5	130.3	130.3	-2.0
Total Paper and Paperboard *	126.7	125.7	125.8	125.8	125.6	125.1	125.1	-0.7
Converted Products	134.8	133.7	132.9	133.1	133.3	133.4	133.4	-0.6
Waste Paper	117.4	117.7	112.1	107.4	108.4	107.5	107.5	-13.5
All Commodities	117.2	118.9	119.1	118.9	118.4	119.0	119.0	0.8
Industrial Commodities	117.4	119.0	119.4	118.8	117.9	118.5	118.5	0.2

SOURCE: Producer Price Indexes: Bureau of Labor Statistics, U.S. Department of Labor * Computed by AFPA

Linerboard Production for Export



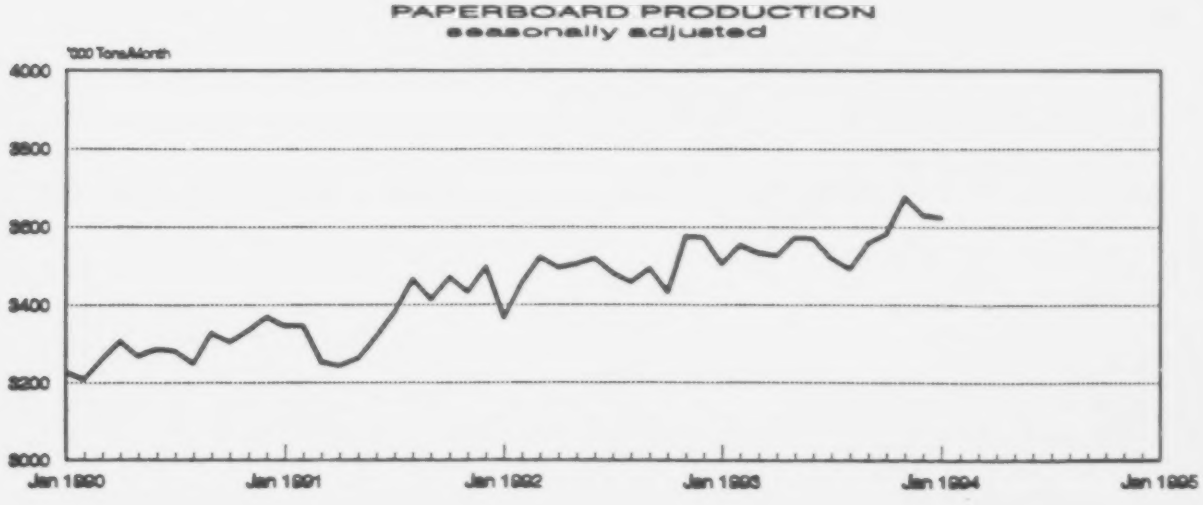
U.S. shipments of the major printing-writing paper grades (uncoated groundwood; uncoated free sheet; coated groundwood and coated free sheet) lagged their year ago level by 3.0% in January 1994, with all four categories posting declines. Total new supply (domestic shipments plus imports minus exports) of these grades was up a fractional 0.4%.

Imports of the four major printing-writing papers grades jumped 24% last year to 4.8 million tons. The import gains reflected increased shipments of printing-writing papers to the U.S. from Western Europe, Canada, and Brazil.

Printing-writing paper inventories at reporting mills (accounting for about 85% of total industry) have trended upwards during the past year or so, rising from 1.39 million tons in January 1993 to 1.69 million tons in January of this year. However, the dollar value of printers' inventories as compiled by the Commerce Department and deflated by AF&PA suggest that these end use inventories have undergone some trimming since early 1993.

As noted above, the Canadian Pulp and Paper Association has reclassified Canadian exports to the U.S. from newsprint to groundwood in the years 1991, 1992, and 1993. The 1993 revision added approximately 300,000 tons to U.S. groundwood imports for that year and 190,000 tons in 1992.

Paperboard: Seasonally-adjusted paperboard production was reported at 3.62 million tons in January 1994, down from November's level of 3.68 million tons but still 1.6% ahead of 1993's average monthly rate of 3.57 million tons a month. The January 1994 level of paperboard production exceeded its year-ago rate by 3.4%.



Linerboard production for export exceeded its year-ago level by 39% in January. As is indicated by the graph on the bottom of page 10, export-related linerboard production has been tracing out a strong upward pattern since last September.

Containerboard production for box-related domestic use was essentially even with its year-ago level in January, even though box shipments were up 4.4% and cut-up was up 6.0%.

The level performance of containerboard production for box-related domestic use relative to January 1994 reflects continued inventory trimming. Roll stocks at box plants and mills declined 69,000 tons in January 1994, versus a 38,000 ton increase in January 1993. Absent that net swing, containerboard production for domestic use would have posted a 4.7% increase versus year ago in January, about in line with box shipments.

Boxboard production was up 3.8% versus year-ago in January. The strongest increase within the grade structure -- 11.2% -- was posted by "other boxboard for domestic use," which benefited from strong demand for gypsum wallboard deriving from last year's upswing in residential construction activity. Total folding boxboard production for domestic use held approximately even with its year-ago level in January.

Production of set-up boxboard for domestic use and milk carton and food service board for domestic use posted respective gains of 39.3% and 5.5% relative to their year ago levels in January.

Boxboard production for export eased to 77,000 tons in January from an average level of 96,000 tons during the prior three month period. As a result of that decline, boxboard production for export trailed its year-ago level by 15.0% in January.

Total paperboard production for export -- containerboard and boxboard combined -- exceeded its year-ago volume by 20.8% in January, with all of the gain accounted for by unbleached kraft paperboard.

FIBROUS RAW MATERIALS

U.S. consumption of chemical paper grade market pulp totaled 5.92 million short tons in 1993, according to AF&PA's Pulp Group. Domestic mills accounted for 48% of that total, followed by Canada (41%), Brazil (9%), and Chile (1%). The Nordic and Iberian regions respectively supplied less than 1% of U.S. chemical paper grade market pulp consumption in 1993.

PAPER RECOVERY AT NEW WATERSHED

Paper recycling reached a new watershed in 1993. Even though U.S. exports of recovered paper declined 8.7%, or 560,000 tons, due to poor economic conditions abroad and increased paper recovery in Europe, domestic consumption of recovered paper expanded at a sufficiently rapid pace to lift overall recovery (i.e., for domestic use and export) by 2.2 million tons. This resulted in a U.S. recovery level of 35.8 million tons in 1993, up 6.5% over 1992 and 37% relative to 1988, the industry's base year for measuring recycling progress. The U.S. paper recovery rate reached the industry's 40% goal in the fourth quarter of 1993, two years ahead of schedule, and measured 39.4% for the entire year.

Recovery increased significantly for all of the recovered paper categories in 1993, except high grades which remained flat. Overall recovery of OCC for domestic use and export rose 9.0% (1.37 million tons) last year to 16.7 million tons. That increase lifted the U.S. recovery rate for OCC to 62.5% in 1993, as compared with 58.7% in 1992 and 52.0% in 1988.

The recovery of ONP expanded 6.9% (480,000 tons) last year.

Recovery of mixed papers for domestic use and export rose 8.0% last year to 4.7 million tons, while recovery of high grade papers (high grade deinking and pulp substitutes) turned in a flat performance from 1992 to 1993.

Domestic Recovered Paper Consumption. -- U.S. mill consumption of recovered paper surged 10.3% or 2.7 million tons in 1993 to 28.9 million tons. The largest advance, both on a percentage and tonnage basis, was recorded by OCC, the consumption of which rose by 13.3% or 1.66 million tons. Mill consumption of the other four recovered paper categories increased as follows: ONP (+9.9%, 446,000 tons); mixed papers (+8.5%, 293,000 tons); high grade deinking (+5.5%, 148,000 tons); and pulp substitutes (+4.6%, 137,000 tons).

Last year's 10.3% increase in recovered paper consumption by U.S. mills built on a 10.8% increase in 1992. In the five years since 1988, U.S. mills increased their consumption of recovered paper at an average annual rate of 8.0%. AF&PA's latest Capacity Survey pegs growth at 5.7% a year for the 1994-96 period.

The utilization rate for recovered paper -- U.S. mill consumption of recovered paper as a percentage of paper and paperboard production -- rose to 33.6% in 1993, up from 31.0% in 1992 and 25.2% in 1988.

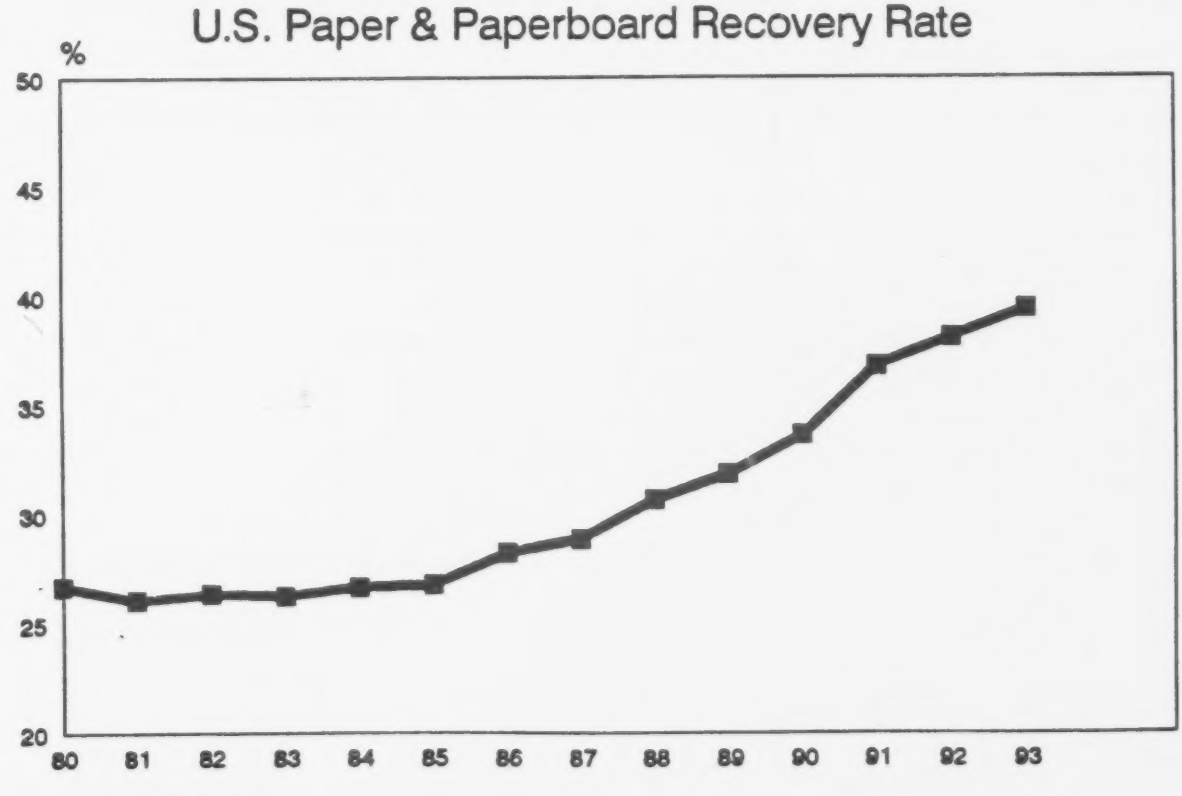
Exports.--Four of the five major recovered paper grades registered export declines in 1993, the one exception being mixed papers. Exports of corrugated paper and paperboard (old corrugated containers (OCC)), the largest of the recovered paper export categories, declined 11.0% in 1993, after edging up 1.6% in 1992. As a result of last year's sharp decline, U.S. OCC exports were no higher in 1993 than in 1992.

Taiwan (501,307 tons), Korea (468,506 tons), Mexico (277,330 tons) and Japan (205,397 tons) headed the list of destinations for U.S. exports of OCC last year. While U.S. exports of old corrugated to Korea bucked the general downtrend by rising 29% in 1993, deliveries to Taiwan, Mexico and Japan declined 1%, 43%, and 17%, respectively.

U.S. exports of old newspapers (ONP) -- includes other groundwood -- declined 1.3% in 1993 following an essentially flat performance in 1992. U.S. exports of ONP have increased approximately 4% since 1988. Korea (374,466 tons), Taiwan (193,119 tons), Japan (148,574 tons) and Mexico (102,971 tons) were the leading foreign sources of demand for U.S. ONP in 1993. U.S. deliveries of ONP to Korea and Taiwan contracted 14.4% and 28.9%, respectively, last year, while exports to Japan and Mexico gained significant ground.

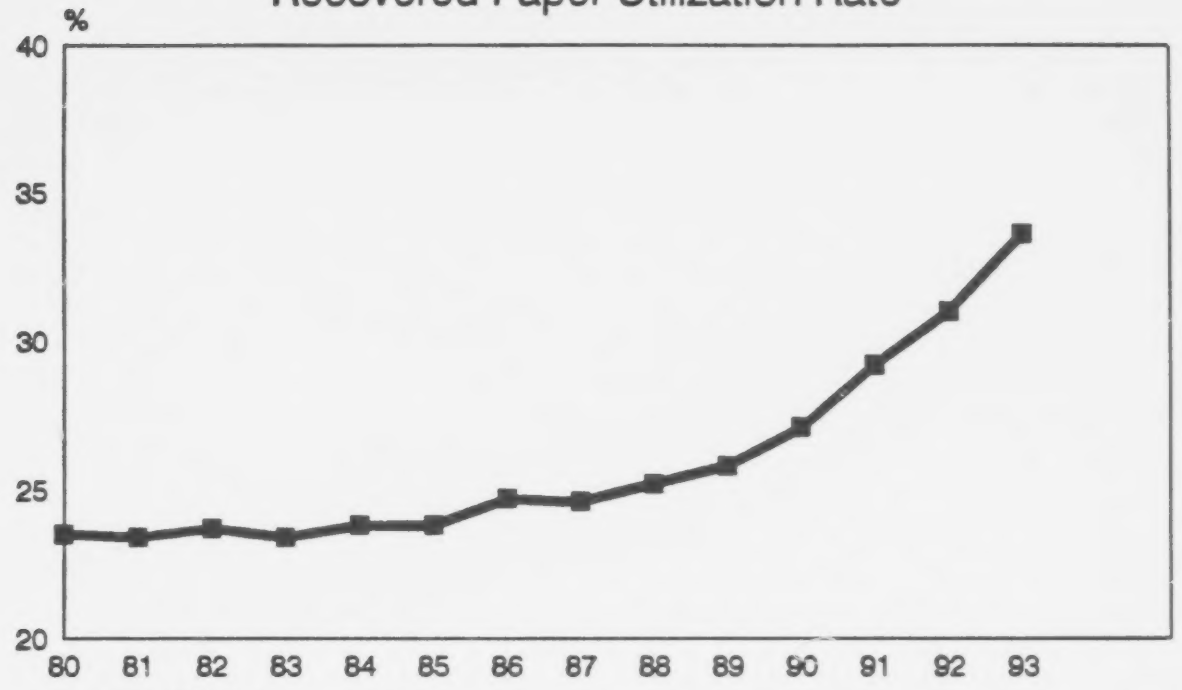
Overall U.S. exports of high grade recovered papers (deinking grades as well as pulp substitutes) declined 4.8% in 1992 and an additional 19.8% last year. Measured relative to 1988, they were off 5.7% in 1993.

As was noted above, "mixed papers" were the only recovered paper category where exports managed to gain ground in 1993. However, last year's 6.4% advance in exports of mixed papers offset only about half of 1992's decline. Relative to 1988, U.S. exports of mixed papers were up 2.7% in 1993.



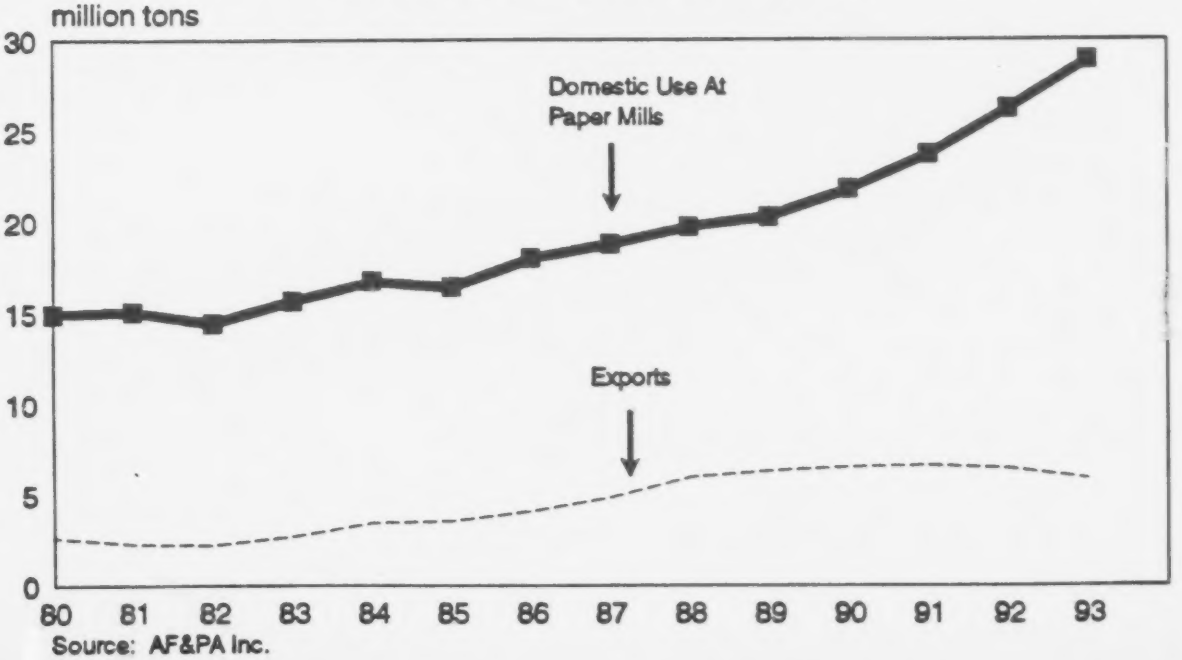
Source: AF&PA, Inc.

Recovered Paper Utilization Rate



Source: AF&PA, Inc.

Recovered Paper Growth Patterns: Domestic Mill Use Vs. Exports



Source: AF&PA Inc.

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INDUSTRY FACT SHEET
MONTHLY STATISTICAL SUMMARY INSERT
VOL. 72, NO. 2
FEBRUARY, 1994

PRODUCTION (000 TONS)

PAPER GRADES	(P) JAN 1994	(R) DEC 1993	JAN 1993	ONE MONTH 1994	ONE MONTH 1993	% CHANGE YR TO DATE 1994/1993
Newsprint	618	577	615	618	615	0.5
Printing & Writing	1,956	1,924	2,006	1,956	2,006	-2.5
Uncoated Groundwood (s)	144	148	147	144	147	-1.9
Coated Groundwood (s)	346	345	361	346	361	-4.4
Coated Free Sheet (s)	309	317	316	309	316	-2.3
Total Coated Paper (s)	654	662	677	654	677	-3.4
Uncoated Free Sheet Paper (s)	1,023	977	1,052	1,023	1,052	-2.8
Thin Paper (s)	13	14	14	13	14	-9.4
Cotton Fiber Paper (s)	13	14	14	13	14	-7.2
Bleached Bristols (s)	109	111	102	109	102	7.4
Tissue Paper	517	514	495	517	495	4.5
Total Pkg & Other Paper	387	371	387	387	387	-0.0
Unbl. Kraft Paper (s)	197	180	192	197	192	2.8
Bl. Kraft Paper (s)	34	32	35	34	35	-2.0
Specialty Pkg. Paper	50	50	53	50	53	-4.9
Special Industrial Paper (s)	105	110	107	105	107	-1.9
TOTAL PAPER	3,478	3,385	3,502	3,478	3,502	-0.7
PAPERBOARD GRADES						
Unbleached Kraft Paperboard	1,897	1,854	1,843	1,897	1,843	2.9
Unbleached Kraft Linerboard *	1,749	1,731	1,700	1,749	1,700	2.9
Other Unbl. Kraft Paperboard	148	123	144	148	144	2.8
Semichemical Paperboard	503	515	495	503	495	1.7
Bleached Paperboard	384	415	382	384	382	0.5
Recycled Paperboard	980	873	921	980	921	6.4
TOTAL PAPERBOARD	3,764	3,657	3,642	3,764	3,642	3.4
TOTAL PAPER & PAPERBOARD	7,242	7,042	7,144	7,242	7,144	1.4

(000 SHORT TONS) U.S. MARKET PULP SHIPMENTS	JAN 1994	DEC 1993	JAN 1993	ONE MONTH 1994	ONE MONTH 1993	%CHANGE YR TO DATE 1994/1993
Total	710	755	653	710	653	8.8%
Total Sulfate	693	725	642	693	642	7.9%
Bleached Sulfate	676	711	627	676	627	7.9%
Softwood	403	410	419	403	419	-3.8%
Hardwood	273	301	207	273	207	31.6%
Unbleached	17	14	15	17	15	8.5%
Sulfite Blch & Unblch	18	30	11	18	11	59.1%
CONSUMPTION OF FIBROUS RAW MATERIALS AT PAPER & PAPERBOARD MILLS						
Wood Pulp	5,311	5,383	5,475	5,311	5,475	-3.0%
Recovered Paper	2,434	2,294	2,371	2,434	2,371	2.6%

* Includes all unbleached kraft paperboard exports
(s) - Shipments
R - Revised
P - Preliminary

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INDUSTRY DATA March 31, 1994	1992	1993	1993	1993 R	1994 P	Ann. Rt. ytd '94	% Chg 94/93
PAPER & PAPERBOARD – Tons (000)			NOV	DEC	JAN		
Total Production (AFPA)....: excluding :	82,941	84,357	7,035	7,042	7,242	86,906	1.4
Total Seasonally Adjusted....: construction :			7,095	7,114	7,016	84,192	1.4
Imports (including Products)....: and wet :...E	12,406	13,831	1,187	1,115	1,187	14,243	8.0
Exports (including Products)....: machine :...E	8,946	9,099	774	851	803	9,635	5.6
Apparent Consumption....: grades :...E	86,401	88,938	7,508	7,378	7,400	88,799	1.9
Paper Production % Tonnage Capacity	91.1	91.3	91.2	86.9	89.6	89.6	
Paperboard Production % Tonnage Capacity	94.4	94.0	95.2	93.5	97.0	97.0	
PAPER, PAPERBOARD & PRODUCTS			NOV	DEC	JAN		
Imports....:Including Construction and :...E	12,543	13,971	1,200	1,126	1,199	14,383	8.0
Exports....: WMB Grades (excl. HPB) :...E	8,971	9,126	776	853	805	9,661	5.7
Market Wood Pulp Shipments - Tons (000)	8,291	8,366	743	766	710	8,524	8.8
Wood Pulp Imports - Tons (000)...E	4,662	5,320	428	421	431	5,171	-12.5
Wood Pulp Exports - Tons (000)...E	8,421	8,851	496	530	476	8,708	-7.0
Raw Materials Consumption - Tons (000)							
Wood Pulp....:consumption for:	56,873	62,356	5,228	5,383	5,311	63,737	-3.0
Recovered Paper....:onstruction & :	25,336	27,994	2,350	2,294	2,434	29,208	2.6
Total....: WMB grades :	80,168	90,350	7,578	7,677	7,745	92,946	-1.3
Pulpwood Consumption Cords (000) Amer. Pulpwd. Assn. *	104,598	105,275	8,678	9,004	N/A	N/A	N/A
Employment (000)			NOV	DEC	JAN		
Paper and Allied Products..RS....Total	687.3	680.2	676.1	675.7	672.8	672.8	-1.2
Pulp, Paper and Board Mills..RS....Total	238.8	233.5	230.2	229.9	230.2	230.2	-2.3
Avg. Hourly Earnings of Production Workers ($)							
Paper and Allied Products..RS	13.07	13.42	13.54	13.61	13.57	13.57	3.0
Pulp, Paper Mills....RS	16.19	16.72	16.96	17.02	16.94	16.94	4.4
Paperboard Mills....RS	16.24	16.77	17.04	17.15	16.93	16.93	3.1
New Plant & Equip. Expenditures, Paper & Allied Prod.			IQ '93	IIQ '93	IIIQ '93		
(Rept. by US Dept. of Com., Ann. Rates, Bill $)*	10.53	10.23	10.60	10.27	9.64	10.23 y	-2.8
Index of Output per Man-Hour (1982=100)			NOV	DEC	JAN		
:in Pulp, Paper:...Production Workers	113.2	117.6	120.0	121.4	119.3	119.3	3.2
:and Board Mills:...All Employees	112.9	117.4	119.9	121.5	119.2	119.2	3.8
Paper & Allied Products ($Million $)							
Industry Shipments (Dept. of Commerce)*	131,282	129,407	10,814	10,735	10,612	127,344	-2.4
Pulp, Paper and Paperboard*	53,442	52,111	4,353	4,280	4,245	50,940	-3.3
Inventories (End of Period) - Total Industry*	13,387	13,487	13,520	13,487	13,337	13,337	-0.7
Pulp, Paper and Paperboard*	5,535	5,783	5,802	5,783	5,763	5,763	3.7
Paper & Allied Products Companies ($Million $)			IQ '93	IIQ '93	IIIQ '93	1,993	
Sales (Corporations Only)	127,562	N.A.	31,865	33,187	33,181	130,977	2.7
Earnings (Corporations Only)	1,213	N.A.	686	814	(1,746)	(328)	N.M.
Depreciation (Corporations Only)	6,974	N.A.	1,800	1,868	1,841	7,345	5.3
Net Worth (Corporations Only)	47,520	N.A.	47,873	47,838	46,956	46,956	-3.3
Price Indexes (Bureau of Labor Statistics) 1982=100			NOV	DEC	JAN		
Pulp, Paper & Products, ex. Building Grades	129.4	127.6	126.9	126.9	126.8	126.8	-1.2
Wood Pulp	118.9	104.3	98.7	98.5	100.0	100.0	-10.5
Waste Paper	117.4	117.7	107.4	108.4	107.5	107.5	-13.5
Paper	123.2	123.8	123.7	123.4	122.7	122.7	0.0
Paperboard	134.3	130.0	130.5	130.5	130.3	130.3	-2.0
Paper Demand (Indexed: 1987=100)			NOV	DEC	JAN		
Total Paper Production *	110.8	112.4	111.2	113.2	110.3	110.3	-0.7
Paper New Supply *	102.5	106.1	106.0	104.3	104.8	104.8	0.5
Demand Indicators - (Weighted Average) *	101.0	105.6	106.3	106.5	106.7	106.7	1.9
Production of Nondurable Goods..RS....*....(21.2%)	106.5	108.7	109.1	109.5	109.4	109.4	1.4
Disposable Income....*....(23.9%)	110.4	112.5	114.3	115.0	114.5	114.5	3.7
Total Printing and Publishing..RS....*....(54.9%)	99.0	101.4	101.7	101.7	102.2	102.2	1.3
Paperboard Demand (Indexed: 1987=100)			NOV	DEC	JAN		
Total Paperboard Production *	111.9	114.1	117.8	116.4	116.1	116.1	3.4
Production for Domestic Use ...E	109.6	112.5	115.5	112.9	112.7	112.7	1.5
Demand Indicators - (Weighted Average) *	106.5	110.4	111.7	112.6	113.1	113.1	3.5
Production of Consumer Goods..RS....*....(62.06%)	105.7	108.8	109.7	110.1	110.5	110.5	2.1
Production of Equipment..RS....*....(5.75%)	111.2	118.7	121.8	123.3	124.1	124.1	7.1
Production of Materials..RS....*....(32.19%)	107.7	112.0	113.9	115.5	116.1	116.1	6.5
Market Data			NOV	DEC	JAN		
Newsprint Consumption ($AAR) - Tons (000)...R...E	12,620	12,755	12,886	13,161	13,437	13,437	3.0
Newspaper Pub. and Printing Empl. Total(000)	451	452	454	455	451	451	-0.1
Magazine Advertising Pages (PIB, Inc.)	170,303	168,589	17,785	14,903	10,413	124,951	2.8
Wholesalers Sales and Inventories ($Million $)							
Total Paper & Pap. Prdcts., ex Wallpaper...Sales	51,016	53,814	4,707	4,614	4,499	4,499	7.1
Inventories (End of Period)	5,396	5,882	5,466	5,882	5,896	5,896	6.7
Fibre Box Data (Fibre Box Association)			NOV	DEC	JAN		
Fibre Box Shipments (Million square feet)	336,696	353,756	28,943	28,109	29,565	354,780	4.4
Containerbd Inventory at Mill & Plant (000 Tons)	2,918	2,501	2,391	2,501	2,432	2,432	-17.5
Retail Trade ($Billion $)							
Total Retail Sales *	1,955	2,084	180	182	181	2,172	7.0
Nondurable Goods Stores Sales *	1,253	1,302	110	111	111	1,332	4.0
General Economic Data			NOV	DEC	JAN		
Total Industrial Production (Index 1987 = 100)*	106.5	111.0	112.8	114.0	114.6	114.6	4.9
Producer Prices (All Commodities, Index: 1982=100)	117.2	118.9	118.9	118.4	119.0	119.0	0.8
Consumer Prices (All Items-Urban Con.) (1982-4=100)	140.3	141.9	145.8	145.8	146.2	146.2	2.5
Gross Domestic Product - Annual Rate ($Billions$) *			IIQ '93	IIIQ '93	IVQ '93		
G.D.P. or Expenditure - Current $	6,038.5	6,379.4	6,327.6	6,395.9	6,532.4	6,379.4	5.6
G.D.P. or Expenditure - 1987 $	4,986.3	5,137.7	5,102.1	5,138.3	5,232.1	5,137.7	3.0
Paper & Paperboard Consumption - Pounds per Capita	676	689				688	

N.M. = Not Meaningful R = Revised RS = Revised Series E = Jan. est. by AFPA Y = Full year 1993 * = Sees. Adj. N.A. = Not Available SAAR = Sees. Adj. ann. rate